

---

# e-Elections/e-Surveys

## User guide

Last Updated: March 12, 2014



# Table of Contents

<b>Table of Contents.....</b>	<b>1</b>
<b>Overview .....</b>	<b>2</b>
Before you start.....	2
Access to McGill e-Elections and e-Surveys .....	3
<b>Create an e-election.....</b>	<b>4</b>
Process.....	4
Procedure .....	4
Set up the parameters of the e-election .....	4
Add the content of the e-election .....	10
Add a new title .....	12
Add new text.....	13
Add a new choice of candidates .....	14
Add a new page break.....	16
<b>Preview a consultation .....</b>	<b>17</b>
<b>Edit a consultation .....</b>	<b>18</b>
Access an existing consultation and edit its parameters .....	18
Edit the Content of a consultation .....	19
<b>Test a consultation.....</b>	<b>21</b>
Create a test consultation .....	21
Duplicate a test consultation.....	21
<b>Create an e-survey .....</b>	<b>22</b>
Process.....	22
Procedure .....	22
Set up the parameters of the e-survey.....	22
Add the content of the e-survey.....	25
Add a title and instructions.....	27
Add questions .....	27
Preview.....	28
<b>View the results of a consultation.....</b>	<b>28</b>
<b>Appendix .....</b>	<b>30</b>



HTML codes .....	30
Look for McGill Usernames .....	32
AD group name standards .....	32

## Overview

The e-Elections/e-Surveys tool is available to all McGill Faculties and Units who wish to create an election ballot or a survey online.

Terminology:

**Consultation:** is the term used to refer to an e-election or an e-survey.

**Author:** is the person who creates an e-election or an e-survey. Only the author can identify other people to participate in the management of his consultation i.e. edit the content and view the results.

**AD:** the directory service for Windows which allows to use your McGill Username and password as you login for most McGill systems and helps to create and manage groups, resource accounts, computers, printers and much more.

## Before you start

You will need:

- The Surveys and Elections management role. To request it, contact ICS at 514 398-3398 or at [itsupport@mcgill.ca](mailto:itsupport@mcgill.ca)
- To identify the people eligible to participate in the election/survey.
  - Prepare the list of people and request an AD group:
    1. Ask an HR representative in your department/faculty to prepare the list of McGill usernames (firstname.lastname@mcgill.ca). See how to find [McGill Usernames](#) at the end of this document.
    2. Request an AD group and an AD group name to ICS ([itsupport@mcgill.ca](mailto:itsupport@mcgill.ca)). See the [AD group name standards](#).
  - If you cannot find McGill usernames, prepare the list of people with their McGill IDs and send it to HR (Nancy Wong). Provide the dates of the e-election and the name of people administering it. HR will request a new AD group to ICS.
  - McGill usernames may be entered manually in the e-election parameters.
- To determine the content of the e-election or e-survey: instructions, the choice of candidates and if you wish, their profile, their pictures, CVs or statements, questions to ask.





**Tip**

If you are planning to have the e-election or e-survey tested by people who do not have access to the consultation as managers, it is recommended to create a test consultation for the testers, and when ready, duplicate it and make the duplicate go live. See [Test a consultation](#).

## Access to McGill e-Elections and e-Surveys

**URL:** <https://mcgill.onmivox.ca>

**Login:** McGill Username and Password



# Create an e-election

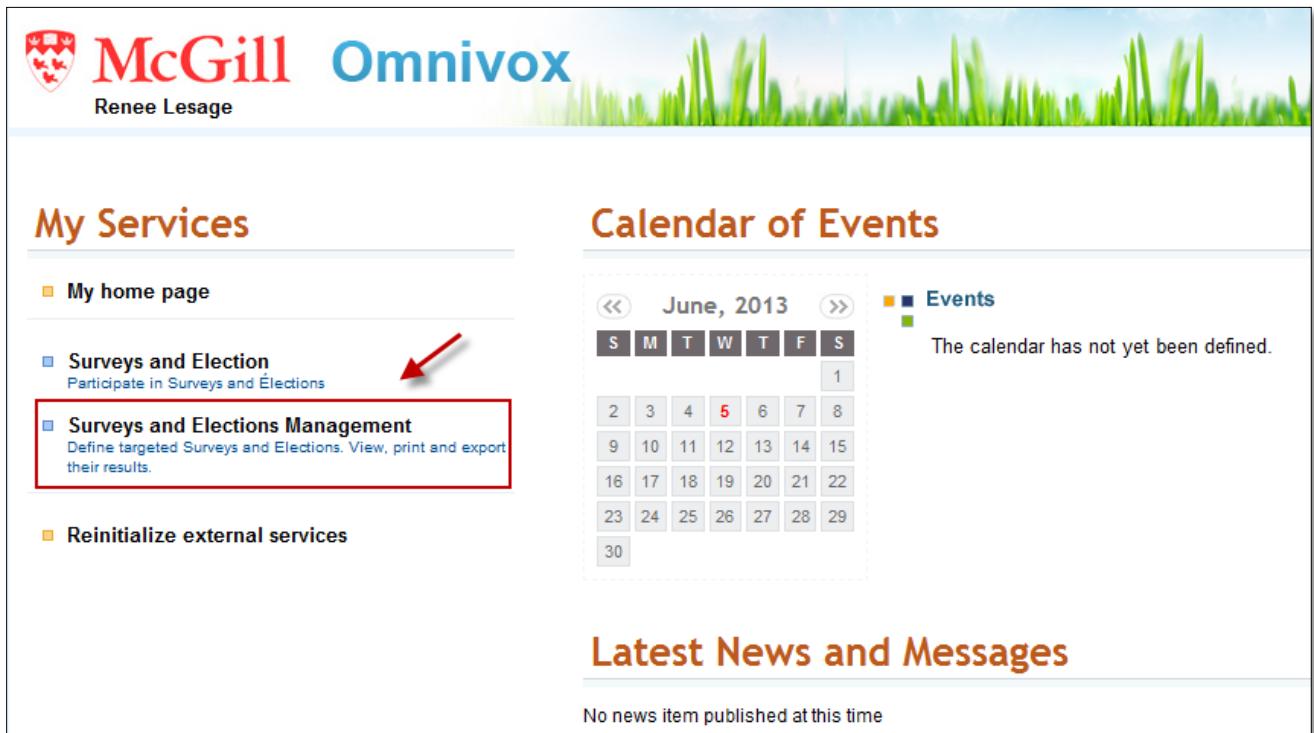
## Process

1. Set up the parameters of the new e-election: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.
2. Add the content of the e-election: titles, text and the choice of candidates.

## Procedure

### Set up the parameters of the e-election

1. On the initial screen, click **Surveys and Elections Management**.



The screenshot shows the McGill Omnivox homepage. At the top, the McGill logo and the word "Omnivox" are displayed, with "Renee Lesage" below it. The background features a green grassy field under a blue sky. The page is divided into sections: "My Services" on the left and "Calendar of Events" on the right.

**My Services**

- My home page
- Surveys and Election**  
Participate in Surveys and Elections
- Surveys and Elections Management**  
Define targeted Surveys and Elections. View, print and export their results. (This link is highlighted with a red box and an arrow points to it)
- Reinitialize external services

**Calendar of Events**

Events

The calendar has not yet been defined.

S	M	T	W	T	F	S
					1	
2	3	4	<b>5</b>	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

**Latest News and Messages**

No news item published at this time



2. Click **Create a new Election**

## Surveys and Elections Management

**Instructions**

To consult or export the **results** of a consultation, click on the  icon located on its right.

To consult or modify the **parameters** of an existing consultation, click on its title.

To **create a new consultation**, two choices are offered to you:

- to **build a consultation from scratch**, select one of the links hereunder
- to **build a consultation based on an existing one**, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.

 [Create a new Survey](#)

 **Create a new Election**

 Create a new consultation *Teaching evaluation*

 Create a new consultation *General Public Survey*  
no login required and matching your website's design

**Display filters**

Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results
----	-------	--------	--------------------	-----------------	-------------------	---------



The **New Election** window appears

3. Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants**. Those two items do not apply to the McGill set up.

**Surveys and Elections Management**  
**New Election**

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

**General information**

Title	McGill Association of University Teachers) - Election of the President <small>The title identifies the consultation, for both its managers and respondents.</small>
Start date	2014 ▾ Jan ▾ 1 ▾ at 08:00 ▾
End of consultation	2014 ▾ Feb ▾ 15 ▾ at End of day ▾

Mode  
 **Optional**  
The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.

**Mandatory with possibility of completing later**  
The system will ask the users to take part in the consultation before they access any Omnivox service. However, the user will be able to choose to take part in the consultation later. Note: as long as the user has not participated, when he accesses Omnivox, the system will ask him again to take part in the consultation.

Number of "complete later" allowed before forcing the user to answer:

Allows a maximum of X access to other Omnivox services before forcing the user to answer the consultation. After this number of access, the user will have no other choice than to fill the consultation before being able to use any other Omnivox service.

Demographics of participants  
 Collect demographic data of participants  
 Do NOT collect demographic data of participants  
The demographics of the participants appear in the results and include:

- the starting date
- the ending date
- the length
- the type of individual (student, teacher, employee)
- the IP address
- the program
- the faculty
- the sex
- the sector of study

- Enter the **Title**: it will appear on the e-election
- Enter the **Start Date**: **do not enter the real date**. Enter a date in a far future and when you are ready to go live, you will be able to edit the consultation and enter the proper date (see [Edit a consultation](#)). Once the consultation is started, the date cannot be changed anymore.



c) Enter the **End of consultation** date. It is the date and time at which the election will end. It must be at a later date than the start date. The end date can always be changed even if the consultation has started.

d) Check off **I cancel my vote** if you want to give the opportunity to voters to cancel their vote.

4. Specify the participants of the election.

a) To specify an AD group, go to the

**Filters** section:

1. Click **+ Add a group from the University's directory**. The groups list appears.
2. Click a group on the left side to select it.
3. Click **Save**

The screenshot shows the 'Select a group of individuals' dialog box on the left and the 'Filters' configuration page on the right.

**Select a group of individuals Dialog:**

- Header:** Select a group of individuals
- Instructions:** This tool is used to select the groups that have the right to participate in the consultation. The list on the left shows all the available groups. It is possible to limit the number of groups by entering a key word in the filter box. The star (\*) character may be used as a wildcard. The members of the groups in the list on the right will be invited to answer to the consultation.
- Filter groups:** Enter a keyword to limit groups displayed
- Available groups:** A list of groups including: 114-Elections\_Sociology\_2013-05, 006-Elections\_Acad, 006-Elections\_fac\_education\_elig\_acads, 006-Elections\_Senate, 006-Elections\_Education\_elig\_acads, 006-Authorized to Email Elections, 021-Elections\_Arts\_Senate, 006-Elections\_April\_Grp1, 006-Elections\_April\_Grp3, 094-Elections\_Anthropology\_Chair, 006-Elections\_Pilot, 914-Elections\_MAUT\_2013-04, 107-Elections\_History\_Chair, 356-Survey\_Proc\_Serv, 032-Elections\_Science\_Senate\_2013-05, 006-Elections\_SCS\_Acad, 025-Elections\_Engineering\_01065666, 006-Elections\_Test\_For\_Norm, 112-Elections\_Political\_Science\_Chair.
- Group(s) selected:** 914-Elections\_MAUT\_2013-04
- Buttons:** Save, Cancel

**Filters Configuration Page:**

- Filters Section:** A red box highlights the 'Filters' tab.
- By Users' Type:** Options include Students, Teachers, Non-teaching employees, and Hourly paid instructors. A note states: 'These users' type will be able to participate in the consultation.'
- Faculty:** A note states: 'If you would like for only certain students to have access to this consultation, you must enter the list of students targeted in section «List of participants to this consultation, regardless of previous filters». You MUST NOT check the «Students» box above.'
- Employees and/or students by Service or department:** A note states: 'List of faculties in which students must be registered or to which employees must belong in order to participate in the consultation. If no faculty is entered, no filter on the faculty will be applied. The list of faculties must be separated using semi-colons. If you want to apply a filter on an interval of faculties, separate these using a hyphen. (ex:0200-0250;1000.METO)'
- Students by Study programs:** A note states: 'Enter the list of departments that employees must belong to in order to participate in the consultation. If left blank, no filter on the department will be applied. The list of departments must be separated using semi-colons. If you wish to enter an interval of departments on which to filter, separate these using a hyphen. (ex: 0200-0250;1000.METO)'
- Individuals by groups in the University's directory:** A red box highlights the '+ Add a group from the University's directory' button. A note states: 'Enter the list of groups in the University's directory that you want to allow to participate in the consultation. The list of groups must be separated by semi-colons. (e.g. group1;group2) poll.'
- Student's academic cycle or program:** Options include 'Do not filter on the academic cycle' (selected), 'Filter on the numbers corresponding to the academic cycles', and dropdowns for 'to' and 'from' years.
- Age:** Options include 'Do not filter based on age' (selected), 'Only accept persons aged between' (with dropdowns for 'from' and 'to' years), and 'Accept only persons of the following gender'.
- Gender:** Options include 'Do not filter on gender' (selected) and 'Accept only persons of the following gender'.



**The groups in the list are AD groups.** To add a new group in the list of groups, send a list of people with their McGill IDs to HR (Nancy Wong). HR will send the list of McGill Usernames to ICS who will create a new AD group.



b) To add eligible voters who are not part of an AD group, go to **the List of participants to this consultation, regardless of previous filters**.

- Enter the McGill Usernames in the **List of employees**.

**List of participants to this consultation, regardless of previous filters**

The students and employees in the lists below will have access to the consultation regardless of the filters specified in section **Filters**.

List of students

To import a student list from a text file, [click here](#).

Input the list of students (by Student Number) that can participate in the consultation. Separate the student numbers by carriage returns.

You may also simply paste the data above from data copied from an Excel column or an Access table.

You can also import a list of students from a text file containing the Student Numbers separated either by carriage returns, semicolons, colons, or the space character.

List of employees

walt.disney@mcgill.ca  
william.shatner@mcgill.ca

To import an employee list from a text file, [click here](#).



**Tip**

If you are not ready to select an AD group but want to save the e-election as an initial draft, simply enter your McGill Username in the **List of employees**. Once you are ready to select a group, remove your username from the list.



5. If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.

Go to **Accessibility restrictions to this consultation's management**. This section shows the list of people having access as Surveys and Elections managers.

To give individuals the permission to manage the e-election, check off their McGill Username.

**Accessibility restrictions to this consultation's management**

Authorized personnel that can access management and results of this consultation	<input checked="" type="checkbox"/> RENEE.LESAGE@MCGILL.CA - Renee Lesage <input type="checkbox"/> MICHAEL.SAMPSON@MCGILL.CA - (ICS) Michael <input type="checkbox"/> RODNEY.JEAN-PAUL@MCGILL.CA - (ICS) Rodney <input type="checkbox"/> ANDREW.BITEEN@MCGILL.CA - Biteen (Secr) Andrew <input type="checkbox"/> CHRISTINE.CHEHADE@MCGILL.CA - Chehade (Secr) Christine <input type="checkbox"/> JOSIE.DAMICO@MCGILL.CA - D'Amico (Science) Josie <input type="checkbox"/> PAULINE.FRIXIONE@MCGILL.CA - Frixione (Secr) Pauline <input type="checkbox"/> MARCUS.GILLIAM@MCGILL.CA - Gilliam (ICS) Marcus <input type="checkbox"/> NORMAN.KLING@MCGILL.CA - Kling (ISR) Norman <input checked="" type="checkbox"/> DAN.OCONNELL@MCGILL.CA - O'Connell (ICS) Dan <input type="checkbox"/> ANGIE.PSARAKOS@MCGILL.CA - Psarakos Angie <input type="checkbox"/> SUSAN.SHARPE@MCGILL.CA - Sharpe (Arts) Susan <input type="checkbox"/> MARINA.TARTAKOVSKAIA@MCGILL.CA - Tartakovskiaia Marina <input type="checkbox"/> JENNIFER.VIENS@MCGILL.CA - Viens (Arts) Jennifer <input type="checkbox"/> MALEK.YALAOUI@MCGILL.CA - Yalaoui (Science) Malek
--	--

Only those persons who have access to the «Surveys and Elections Management» module appear on this list. To add another employee to the list, the person responsible for the «Management Interface» must give them access to the «Surveys and Elections Management» module.

**Note**

Once a consultation has begun, no one can modify the content.

6. Click **Add**. The following screen appears.





Back to my welcome page      Comments      Quit 

**Configuration**  
Parameters  
Content of the consultation

**Test**  
Test the consultation

**Data Analysis**  
Results of the consultation  
Participation ballots (Excel)  
Participation ballots (Html)  
Participation ballots (Zip)  
Participants list

Back to the list of consultations

**Consultation added**

The consultation has been saved successfully. You can now add elements to this consultation.

**Surveys and Elections Management**  
Content of the consultation  
MAUT - Election of the President

Add an element to this consultation

- ✚ Add a title
- ✚ Add instructions
- ✚ Add a choice of candidates
- ✚ Add a page break

## Add the content of the e-election

There is a choice of 4 elements to add to the content:

- A **title**: it is not required since the overall title of the election was defined in the first step of the election creation. However multiple titles may be added, for example if the ballot has multiple parts. Click **Add a title** every time you want to add a new title.
- **Instructions**: any text that you want to add to the content. Multiple paragraphs may be added on different parts of the content. Click **Add instructions** every time you want to add new text.
- The **choice of candidates**: the list of candidates with a photo if desired and a web link to their statements. You can add multiple lists of candidates. For example, add a choice of candidates for the election of the president and add another choice of candidates for the election of committee members. Click **Add a choice of candidates** to add a new choice of candidates.
- A **page break**: at least one page break is required. Click **Add a page break** every time you want to add a new page break.



You can use HTML tags to format text such as changing color, making text bold, changing the font size or adding a hyperlink. To learn more about HTML tags, see the [Appendix - HTML code](#).

See an example of e-election content on the next page.



This election ballot has two parts, one for the election of the president of our association and the second for two members of the Council.

## Election of the president

Title

There are three candidates to the presidency:

### Melissa Nguyen

Melissa currently teaches upper year courses in civil engineering. She has been at McGill 15 years. She is a member of the Canadian Association of University teachers.

### Robert Young

Robert has joined the association in 1995 and became in 2001 a member of the Tenure and Mentoring Committee. He was elected V.P. internal in 2009.

### Thierry Singer

Thierry is presently the chair of the remuneration Committee. He has been an academic advisor for 10 years.

#### 1. Please vote for your favorite candidate



Melissa Nguyen

[Consult the candidate's statement](#)



Robert Young

[Consult the candidate's statement](#)



Thierry Singer

[Consult the candidate's statement](#)

Global Title

MAUT - Election 2013

Page 1/3

Instructions

Instructions

Choice of candidates

Page break

1

2

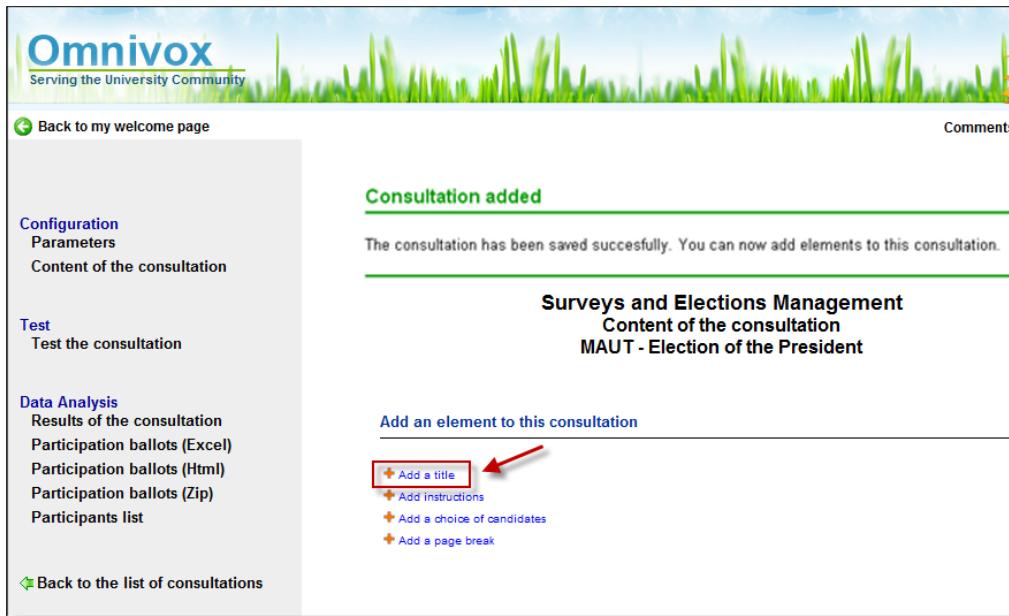
3

Next

Number of pages

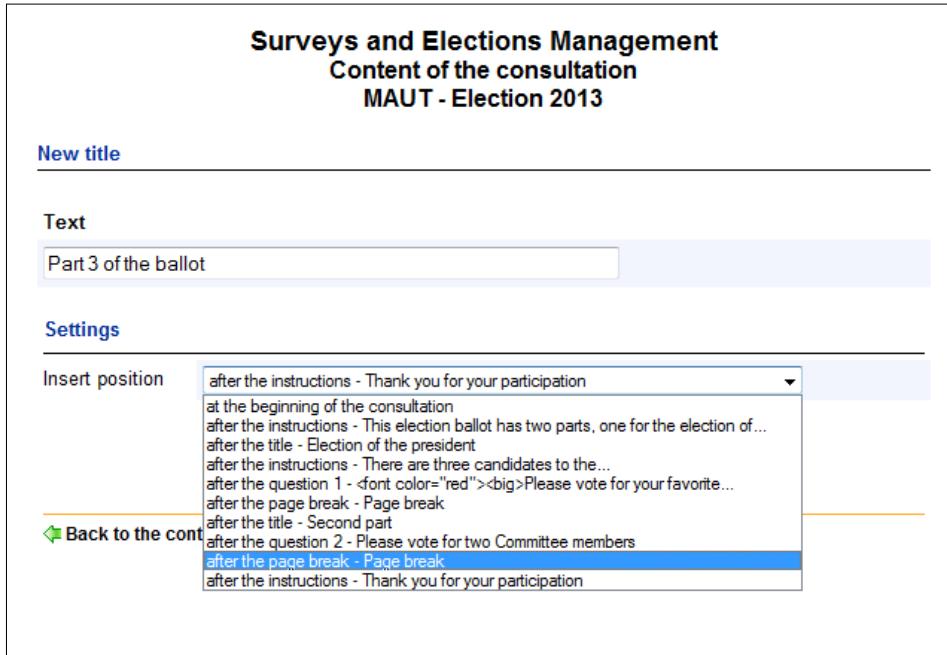
## Add a new title

1. Click Add a Title



The screenshot shows the Omnivox platform interface for managing surveys and elections. The main title is 'Surveys and Elections Management' with the subtitle 'Content of the consultation' and 'MAUT - Election of the President'. On the left, there is a sidebar with links for Configuration, Parameters, Content of the consultation, Test, Data Analysis, and Back to the list of consultations. The right panel displays a message 'Consultation added' and a success message: 'The consultation has been saved successfully. You can now add elements to this consultation.' Below this, there is a section titled 'Add an element to this consultation' with a list of options: 'Add a title' (highlighted with a red box and arrow), 'Add instructions', 'Add a choice of candidates', and 'Add a page break'.

2. Enter the title in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the title to be added in the content.
4. Click **Add**.



The screenshot shows the 'Content of the consultation' editor. At the top, it displays the main title 'Surveys and Elections Management', subtitle 'Content of the consultation', and 'MAUT - Election 2013'. Below this, there is a 'New title' input field containing 'Part 3 of the ballot'. Under the 'Text' heading, there is a text input field with the same content. In the 'Settings' section, there is an 'Insert position' dropdown menu with the following options: 'after the instructions - Thank you for your participation', 'at the beginning of the consultation', 'after the instructions - This election ballot has two parts, one for the election of...', 'after the title - Election of the president', 'after the instructions - There are three candidates to the...', 'after the question 1 - <font color="red"><big>Please vote for your favorite...', 'after the page break - Page break', 'after the title - Second part', 'after the question 2 - Please vote for two Committee members', 'after the page break - Page break' (which is highlighted with a blue selection bar), and 'after the instructions - Thank you for your participation'. At the bottom left, there is a 'Back to the content' link.



## Add new text

1. Click **Add instructions**.

Configuration  
Parameters  
Content of the consultation

Test  
Test the consultation

Data Analysis  
Results of the consultation  
Participation ballots (Excel)  
Participation ballots (Html)  
Participation ballots (Zip)  
Participants list

Back to my welcome page

Comments

Consultation added

The consultation has been saved successfully. You can now add elements to this consultation.

Surveys and Elections Management  
Content of the consultation  
MAUT - Election of the President

Add an element to this consultation

- + Add a title
- + Add instructions
- + Add a choice of candidates
- + Add a page break

Back to the list of consultations

2. Enter the text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the text to be added in the content.
4. Click **Add**.

Surveys and Elections Management  
Content of the consultation  
MAUT - Election 2013

New instruction

Text

There are three candidates to the presidency:  
Melissa currently teaches upper year courses in civil engineering. She has been at McGill 15 years. She is a member of the Canadian Association of University teachers.  
Robert has joined the association in 1995 and became in 2001 a member of the Tenure and Mentoring Committee. He was elected V.P. internal in 2009.  
Thierry is presently the chair of the remuneration Committee. He has been an academic advisor for 10 years.

Settings

Insert position

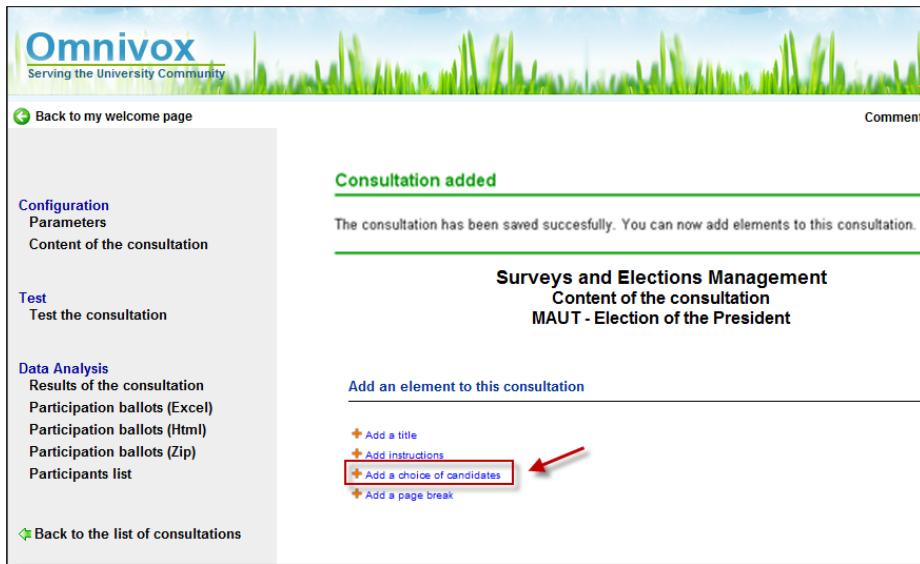
- after the instructions - Thank you for your participation
- at the beginning of the consultation
- after the instructions - This election ballot has two parts, one for the election of...
- after the title - Election of the president
- after the instructions - There are three candidates to the...
- after the question 1 - <font color="red"><big>Please vote for your favorite...
- after the page break - Page break
- after the title - Second part
- after the question 2 - Please vote for two Committee members
- after the page break - Page break
- after the instructions - Thank you for your participation

Back to the content



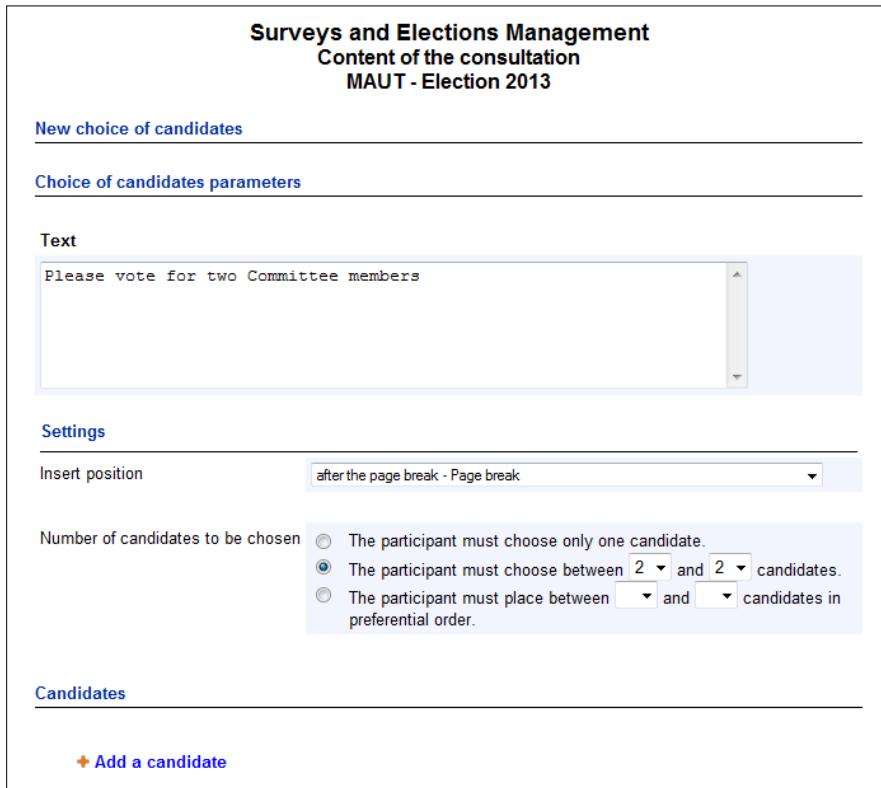
## Add a new choice of candidates

1. Click **Add a choice of candidates**.



The screenshot shows the Omnipox web interface. On the left, there is a sidebar with links for Configuration Parameters, Content of the consultation, Test, Data Analysis, and Participants list. The main content area displays a message 'Consultation added' and 'The consultation has been saved successfully. You can now add elements to this consultation.' Below this, it shows 'Surveys and Elections Management', 'Content of the consultation', and 'MAUT - Election of the President'. Under 'Add an element to this consultation', there are several options: 'Add a title', 'Add instructions', 'Add a choice of candidates' (which is highlighted with a red box and has a red arrow pointing to it), and 'Add a page break'.

2. It is required to add text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.



The screenshot shows the configuration page for a new choice of candidates. It includes sections for 'Text' (containing the text 'Please vote for two Committee members'), 'Settings' (with 'Insert position' set to 'after the page break - Page break'), and 'Number of candidates to be chosen' (with the option 'The participant must choose between 2 and 2 candidates' selected). There is also a 'Candidates' section with a 'Add a candidate' button.



4. Select the **Number of candidates to be chosen**. Either
  - a. Only one candidate.
  - b. Multiple candidates. Select the number of candidates. For example, if 2 candidates must be chosen, select: **The participant must choose between '2' and '2' candidates**.
  - c. Multiple candidates in preferential order. For example, if 3 candidates must be chosen, select: **The participant must place between 3 and 3 candidates in preferential order**.
5. Add the candidates: click **Add a candidate**

**Candidates**

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <span style="font-size: 1.2em;">1.</span> <span style="color: #ccc;">NO PHOTO</span>  <a href="#">Add the photo</a> </div>	Text <input type="text" value="Barbara Sinclair"/>	<a href="#">Remove</a>
	Hyperlink to the candidate's Curriculum Vitae <input type="text" value="http://www.mcgill.ca/law/about/profs"/>	
<a href="#">+ Add a candidate</a>		
<input type="button" value="Add"/>		

- a. Enter the candidate's name in the **Text** box.
- b. If you wish, click **Add the photo** to show the candidate's picture. The following window will pop-up. Click **Browse** to find the picture on your computer and upload it.

**Add/Modify the photo for candidate# 1**

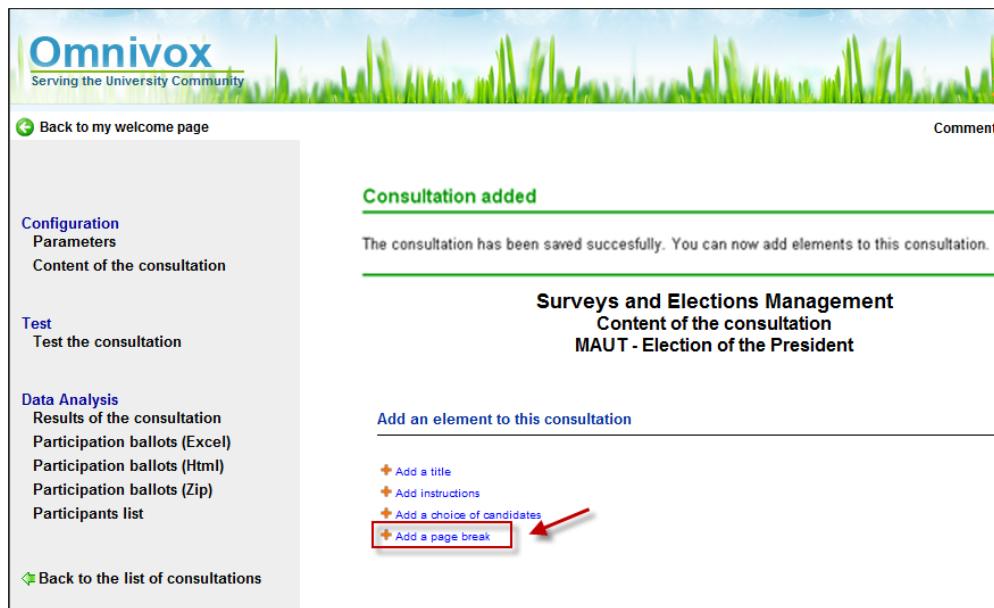
Click on the "Browse" button to go select the photo to be associated with this candidate. Once you are done click on the "Save" button to save the photo.

- c. If the candidate has a statement on a web site, enter the URL in the box where it says: **Hyperlink to the candidate's Curriculum Vitae**. In the voter's view, it will show the link "Consult the candidate's statement".
6. To add more candidates, click **Add a candidate** and repeat steps a) to c) above.
7. Click **Add**.



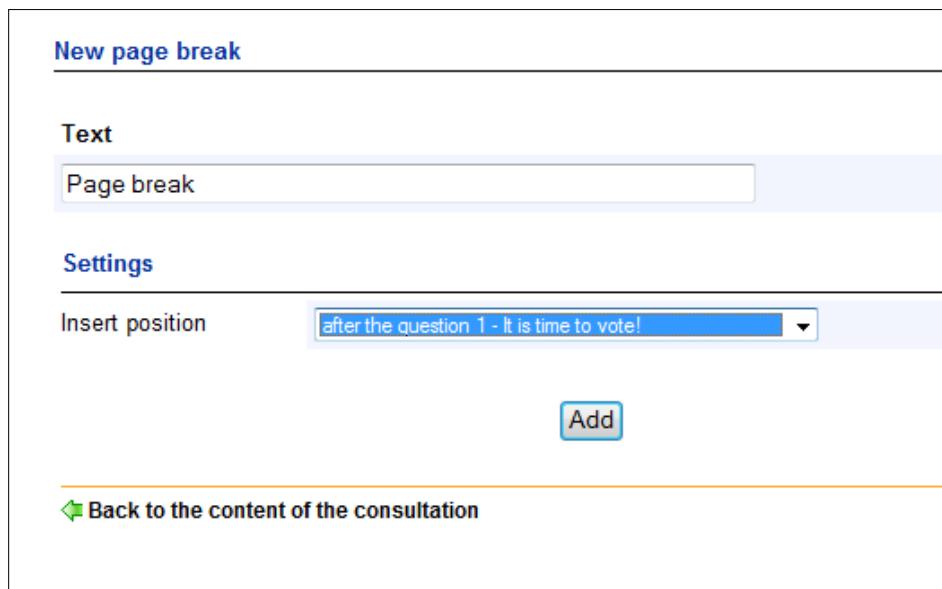
## Add a new page break

1. Click **Add a page break**. It is required to add a least one page brake.



The screenshot shows the 'Consultation added' page on the Omnivox platform. The left sidebar includes links for Configuration Parameters, Content of the consultation, Test (Test the consultation), and Data Analysis (Results of the consultation, Participation ballots in Excel, HTML, or Zip format, Participants list). The main content area displays 'Surveys and Elections Management' and 'Content of the consultation' for 'MAUT - Election of the President'. Below this, a section titled 'Add an element to this consultation' lists several options: 'Add a title', 'Add instructions', 'Add a choice of candidates', and 'Add a page break'. The 'Add a page break' option is highlighted with a red box and a red arrow pointing to it.

The following screen appears:



The screenshot shows the 'New page break' configuration page. It has two main sections: 'Text' (containing a 'Page break' input field) and 'Settings' (containing an 'Insert position' dropdown set to 'after the question 1 - It is time to vote!'). At the bottom is an 'Add' button and a 'Back to the content of the consultation' link.

1. Default text appears in the **Text** box. There is no need to change it since it does not show on the voter's view.
2. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.
3. Click **Add**.



## Preview a consultation

- Once the elements are added to an election or a survey, they are listed on the **Content of the consultation** page.

To preview a specific element, click the **Preview** icon.

Surveys and Elections Management  
Content of the consultation  
MAUT - Election 2013

Add an element to this consultation

[Add a title](#)  
[Add instructions](#)  
[Add a choice of candidates](#)  
[Add a page break](#)

Add a choice of candidates based on the following choice of candidates:  
1. `<font color="red"><big>Please vote for your favorite...` [Add](#)

Move an element to a new position:  
Element to move: `Instructions - This election ballot has two parts, one for the election of the...` [Move](#)  
New position: `at the beginning of the consultation` [Move](#)

List of elements in the consultation

Position	Type	Content	Preview	Delete
1	!	Instruction This election ballot has two parts, one for the election of the president of our...		
2	T	Title <font color="green">Election of the president</font>		
3	!	Instruction There are three candidates to the presidency: <strong><big>Melissa...		
4	?	Candidate choice 1 <font color="red"><big>Please vote for your favorite...		
5	←	Page break Page break		
6	T	Title Second part		
7	?	Candidate choice 2 Please vote for two Committee members		
8	←	Page break Page break		
9	!	Instruction Thank you for your participation		

Legend

-  Title
-  Instruction
-  Choice of candidates
-  Page break



- To simulate an election or a survey, click **Test the consultation** on the sidebar.

**Consultation added**

The consultation has been saved successfully. You can now add elements to this consultation.

**Surveys and Elections Management**  
Content of the consultation  
MAUT - Election of the President

**Add an element to this consultation**

- Add a title
- Add instructions
- Add a choice of candidates
- Add a page break

## Edit a consultation

### Access an existing consultation and edit its parameters

On the **Surveys and Elections Management** screen, you will find your list of consultations. Click the consultation's title to access it.

**Surveys and Elections Management**

**Instructions**  
To consult or export the **results** of a consultation, click on the icon located on its right.

To consult or modify the **parameters** of an existing consultation, click on its title.

To **create** a new consultation, two choices are offered to you:  
 - to build a consultation from scratch, select one of the links hereunder  
 - to build a consultation based on an existing one, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.

+ Create a new Survey  
 + Create a new Election  
 + Create a new consultation *Teaching evaluation*  
 + Create a new consultation *General Public Survey*  
 no login required and matching your website's design

**Display filters**  
 Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results
114.	MAUT - Election of the President	Not started	from January 15, 2014 until February 15, 2014	0	Vote (anonymous)	
113.	MAUT - Election 2013	Not started	from January 15, 2014 until February 15, 2014	0	Vote (anonymous)	



The consultation's parameters appear.

**Surveys and Elections Management**  
**Parameters for the consultation**  
**MAUT - Election 2013**

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[Create a new consultation based on this one \(duplicate this consultation\)](#)

**General information**

Title: MAUT - Election 2013  
The title identifies the consultation, for both its managers and respondents.

Start date: 2014 - Jan - 15 at Beginning of day

End of consultation: 2014 - Feb - 15 at End of day

Mode: This parameter can still be edited once the consultation has begun.

**Optional**  
The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.

**Mandatory**

You can change the parameters. The **Start date** cannot be changed if the consultation has started. The **End date** can be changed any time.

Click the **Save** button at the bottom of the screen.

## Edit the Content of a consultation

1. Access the consultation (see [Access an existing consultation](#) on the previous page)
2. Click **Content of the consultation** on the sidebar.

[Back to my welcome page](#)

**Configuration Parameters** Content of the consultation

**Test** [Test the consultation](#)

**Data Analysis**  
[Results of the consultation](#)  
[Participation ballots \(Excel\)](#)  
[Participation ballots \(Html\)](#)  
[Participation ballots \(Zip\)](#)  
[Participants list](#)

[Back to the list of consultations](#)

**Surveys and Elections Management**  
**Parameters for the consultation**  
**MAUT - Election 2013**

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[Create a new consultation based on this one \(duplicate this consultation\)](#)

**General information**

Title: MAUT - Election 2013  
The title identifies the consultation, for both its managers and respondents.

Start date: 2014 - Jan - 15 at Beginning of day

End of consultation: 2014 - Feb - 15 at End of day



You will be presented with the list of elements in the consultation. You can:

- Add a new element or edit an existing element
- Move an element to another position in the content
- Preview an element
- Delete an element
- Add a new choice of candidates by duplicating an existing one

**Surveys and Elections Management**  
Content of the consultation  
MAUT - Election 2013

Add an element to this consultation

+ Add a title  
+ Add instructions  
+ Add a choice of candidates  
+ Add a page break

Add a choice of candidates based on the following choice of candidates:  
1. <font color="red"><big>Please vote for your favorite... </big></font>

Move an element to a new position:  
Element to move: Instructions - This election ballot has two parts, one for the election of the...  
New position: at the beginning of the consultation

List of elements in the consultation

Position	Type	Content	Preview	Delete
1	Instruction	This election ballot has two parts, one for the election of the president of our...		
2	Title	<font color="green">Election of the president</font>		
3	Instruction	There are three candidates to the presidency: <strong><big>Melissa...		
4	Candidate choice 1	<font color="red"><big>Please vote for your favorite...</big></font>		
5	Page break	Page break		
6	Title	Second part		
7	Candidate choice 2	Please vote for two Committee members		
8	Page break	Page break		
9	Instruction	Thank you for your participation		

Legend

- T Title
- ! Instruction
- ? Choice of candidates
- ← Page break



# Test a consultation

If you want the consultation to be tested by people who do not have **Surveys and Elections management** rights, it is recommended to:

## Create a test consultation

- a. Create the consultation (see [Create an e-election](#) or [Create an e-survey](#)) for an agreed date and time for the testers. (Note that the end date and time can always be changed). Do not add a group in the McGill directory (AD group) in the Filter section of the Parameters.
- b. Enter the McGill Usernames of the testers in the **List of Employees**.
- c. Add the content.
- d. Ask the testers to test the consultation.
- e. Modify the consultation based on the testing results.

## Duplicate a test consultation

When the final version is ready:

- a. Access the test consultation (see [Access an existing consultation](#)).
- b. Click **Create a new consultation based on this one (duplicate this consultation)**.

**Surveys and Elections Management**  
Parameters for the consultation  
MAUT - Election 2013 - Test

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

**Create a new consultation based on this one (duplicate this consultation)**

**General information**

Title	MAUT - Election 2013 - Test <small>The title identifies the consultation, for both its managers and respondents.</small>
Start date	2014 ▾ Jan ▾ 15 ▾ at Beginning of day ▾
End of consultation	2014 ▾ Feb ▾ 15 ▾ at End of day ▾
Mode	<small>This parameter can still be edited once the consultation has begun.</small> <input checked="" type="radio"/> <b>Optional</b> <small>The system will allow the users to take part in the consultation through the</small>

- c. Modify the title if needed.
- d. Enter the proper dates and times.
- e. Select the AD group in the **Filter** section (see [Specify the participants of the e-election](#)).
- f. Remove the testers' McGill Usernames from the **List of Employees**.
- g. Click **Save** at the bottom of the screen.



# Create an e-survey

## Process

1. Set up the parameters of the new e-survey: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.
2. Add the content of the e-survey.

## Procedure

### Set up the parameters of the e-survey

1. Access the **Surveys and Elections Management** screen.
2. Click **Create a new Survey**.

**Surveys and Elections Management**

**Instructions**

To consult or export the **results** of a consultation, click on the  icon located on its right.

To consult or modify the **parameters** of an existing consultation, click on its title.

To create a new consultation, two choices are offered to you:

- to build a **consultation from scratch**, select one of the links hereunder
- to build a **consultation based on an existing one**, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.



**Create a new Survey**

**Create a new Election**

**Create a new consultation Teaching evaluation**

**Create a new consultation General Public Survey**  
no login required and matching your website's design

**Display filters**

Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results
----	-------	--------	--------------------	-----------------	-------------------	---------



3. Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants**. Those two items do not apply to the McGill set up.

**Surveys and Elections Management**  
**New Survey**

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons that can access the consultation.

**General information**

Title	<input type="text" value="Survey about the food at McGill"/>	<small>The title identifies the consultation, for both its managers and respondents.</small>
Start date	<input type="text" value="2013 Jun 12 at Beginning of day"/>	
End of consultation	The consultation will no longer be offered when one of the checked conditions will be met: <input checked="" type="checkbox"/> at the following date: <input type="text" value="2013 Sep 15 at End of day"/>  <input checked="" type="checkbox"/> when <input type="text" value="200"/> participations will have been received	
Mode	This parameter can still be edited once the consultation has begun. <input checked="" type="radio"/> <b>Optional</b> <small>The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.</small>  <input type="radio"/> <b>Mandatory</b> <small>The system will make it mandatory for the users to answer the consultation. In order to access any other Omnivox service, users will first need to answer the consultation. <b>We suggest you only use this option when absolutely necessary since it tends to irritate users</b></small>	

- Enter the title in the **Title** box.
- Select a **Start Date**: **do not enter the real date**. Enter a date in a far future and when you are ready to make the survey available, enter the proper date.
- Specify when the consultation will end. It can be either:
  - A date:  
check off **at the following date** and enter the date.
  - After a specific number of participations is reached:  
check off **when x participations will have been received** and select a number in the dropdown list.
  - When one of the two conditions above is met.  
check off both conditions and select a date and the number of participations.



d) If you want the survey to be anonymous, check off **Gather ballots on anonymous basis**. You will not have access to participants' identities. A user will not be able to participate more than once.

Gathering of results

**Gather ballots on an anonymous basis**  
 You will not have access to participants' identities if this option is checked. However, just like for a consultation where the identity of each respondent is displayed on the Participation ballot, a user will not be able to answer the consultation more than once.

e) To allow the end user to save the results after each page instead of the end of the survey, check off **Save the results after each page change**.

Progressive save

**Save only the final results**  
 Allow to save the results only at the end of the consultation.

**Save the results after each page change**  
 Allow to save the results at each page change. If the user does not complete the consultation, the completed pages will still be saved.

Send an email on reception of a participation   
 When the system receives a new participation, an email with the content of the participation is sent to the list of addresses above. The email addresses must be separated by semi-colons. (i.e: mister@domain.com;madam@domain.com)

f) If you wish, enter an email address to receive a message with the content of the participations.

4. Specify the participants of the survey. Do the same as for an e-election [on page 7 and 8](#) of this document.

5. If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.

Go to **Accessibility restrictions to this consultation's management**. This section shows the list of people having access as Surveys and Elections managers. Check off their McGill Usernames to give individuals the permission to manage the e-election.

**Accessibility restrictions to this consultation's management**

Authorized personnel that can access management and results of this consultation

RENEE.LESAGE@MCGILL.CA - Renee Lesage  
 MICHAEL.SAMPSON@MCGILL.CA - (ICS) Michael  
 RODNEY.JEAN-PAUL@MCGILL.CA - (ICS) Rodney  
 ANDREW.BITEEN@MCGILL.CA - Biteen (Secr) Andrew  
 CHRISTINE.CHEHAD@MCGILL.CA - Chehade (Secr) Christine  
 JOSIE.DAMICO@MCGILL.CA - Damico (Science) Josie  
 PAULINE.FRIXIONE@MCGILL.CA - Frixione (Secr) Pauline  
 MARCUS.GILLIAM@MCGILL.CA - Gilliam (ICS) Marcus  
 NORMAN.KLING@MCGILL.CA - Kling (ISR) Norman  
 DAN.OCONNELL@MCGILL.CA - O'Connell (ICS) Dan  
 ANGIE.PSARAKOS@MCGILL.CA - Psarakos Angie  
 SUSAN.SHARPE@MCGILL.CA - Sharpe (Arts) Susan  
 MARINA.TARTAKOVSKAIA@MCGILL.CA - Tartakovskia  
 Marina  
 JENNIFER.VIENS@MCGILL.CA - Viens (Arts) Jennifer  
 MALEK.YALAOUI@MCGILL.CA - Yaloui (Science) Malek

Only those persons who have access to the «Surveys and Elections Management» module are able to add another employee to the list. The person responsible for the «Management Interfaces» must give them access to the «Surveys and Elections Management» module.

**Add** **Cancel**

6. Click **Add**. The **Content of the consultation** screen will appear.



## Add the content of the e-survey

The list of elements that you can add to your survey shows on that page. Click **+ Add element name** to add a new element.

**Consultation added**

---

The consultation has been saved successfully. You can now add elements to this consultation.

---

**Surveys and Elections Management**  
**Content of the consultation**  
**Survey about the food at McGill**

---

[Add an element to this consultation](#)

---

[+ Add a title](#)  
[+ Add instructions](#)  
[+ Add a question with one or multiple answers to choose from](#)  
e.g. Have you ever studied in a program other than the one in which you are currently enrolled?  
Which program(s) from the following interested you at the time you were applying for admission?

[+ Add a question with answers to place in order of preference](#)  
e.g. Organize the following matters in order of preference.

[+ Add a question with scaled answers](#)  
e.g. Evaluate the quality of teaching methods based on the indicated scale.

[+ Add a question with no proposed answers](#)  
e.g. What would you change in the current program?

[+ Add a question with numerical answer](#)  
e.g. How many hours a week do you spend studying outside regular course hours?

[+ Add a page break](#)

**Title:** add a title that is not the same as the global title added to the parameters. If your survey has many sections, you can add, for example, a title at the beginning of each section of the survey.

**Instructions:** any text that you want to add to the survey.

**Questions:** the types of questions that you can add are:

- With one or multiple answers
- With answers to place in order of preference
- With scaled answers
- With no proposed answers
- With a numerical answer

**Page break:** add a page break if you want to add another page to the survey.

View an example of a survey on the next page.





## Personal information

This section is not required.

Title

Instructions

1. Your department

- ICS
- NCS
- CCS
- Other

One or multiple  
answers question

2. How many times a month do you eat in one the McGill food services?

Question with no  
proposed answer

## Quality of food

Title

3. Order of preference

- Faculty club
- Engineering café
- Burnside café
- Avocato café
- Thompson house

Question  
with  
answers to  
place in  
order of  
preference

Comment

1

2

Page break



Next



**Add a title and instructions** (text): same as for the e-election (see [pages 12-13](#) of this document).

**Add questions:** click on **add a question with....** for the type of question that you wish to add.

- Select the desired options, add the elements of the question and click **Add**.
- Here is an example below of the **question with one or multiple choice answers**

**New question**

**Parameters for questions with one or multiple choice answers**

**Text**  
What are your 2 most favorite types of food?

**Settings**

Insert position: after the question 3 - Order of preference

Number of possible answers:  
 The participant must select only one answer.  
 The participant must choose exactly 2 choice of answers.  
 The participant must choose between  and  choice of answers  
 The participant must choose one answer from the list. (The parameter 'Allow free composition' is not available in this mode)

Mandatory answer:  If this box is checked, the participant must correctly answer the question in keeping with the number of possible answers. Otherwise, the participant may not answer.

Allow the participant to enter a comment:  If there is a check in this box, Omnitrix will allow the participant to enter a comment after the question.  
The text that will appear when a comment is being entered: Comment

Jump to an item:  
This option allows to define a section jump to another element of the consultation.

**Choice of answers**

Text of possible answers	Allow free composition*
1. Chinese	<input type="checkbox"/> Remove
2. Indian	<input type="checkbox"/> Remove
3. Italian	<input type="checkbox"/> Remove

\*The possibility of entering free composition allows you to create a choice of answers that the participant may choose from as well as to enter text. (e.g.: Other\_\_\_\_\_)

**+ Add a choice of answers**

**Add** **Save the question**

**Click Add a choice of answers for every choice that you want to add**

**Enter your question**

**Select the position of the question in the survey**

**Select the number of possible answers**

**Is it a mandatory question?**

**Allow the end user to enter comments**

**You will see the **Jump to an item** option only if other questions are following. It is used to hide items in the questionnaire.**



The list of elements of the survey appears on the **Content of the Consultation** page.

**Preview:** see how to preview and test the consultation in this document on [page 17-18](#) and how to edit the consultation on [page 18-20](#)

## View the results of a consultation

- Results of the consultation
  - You must wait after the end of the consultation to view the results. Only the author of the consultation and the people who were given the authorization by the author (see page 9 of this document) can view the results.
- The list of participants
  - For an election, the list is available before the consultation's end.
  - For a survey, the list of participants is not available if the anonymous option was selected for that survey.

To view the results or the list of participants:

1. Access the consultation
2. Click one of the items in the **Data Analysis** section of the sidebar.

**Surveys and Elections Management**  
Parameters for the consultation  
MAUT - Election 2013

**Configuration Parameters**  
Content of the consultation

**Test**  
Test the consultation

**Data Analysis**

Results of the consultation  
Participation ballots (Excel)  
Participation ballots (Html)  
Participation ballots (Zip)  
Participants list

Please carefully edit the parameters of this consultation, as it has been or is still available. According to the modified parameters, it is possible that they alter the meaning or outcome. We recommend that you review the changed settings to avoid all situations that may affect the results.

**Instructions**  
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[+ Create a new consultation based on this one \(duplicate this consultation\)](#)

**General information**

Title	MAUT - Election 2013
The title identifies the consultation, for both its managers and respondents.	
Start date	2013 June 12 at 00:00
End of consultation	2013 Jun 12 at 15:00

[Back to the list of consultations](#)



**Participants list:** opens an Excel spreadsheet listing the people who submitted their answers.

**Results of the Consultation:** view of the total number of answers for each choice. The answers to a question with no proposed answer are available only by accessing the **Participation ballots**.

 **McGill**

Consultation done via Omnivox  
MAUT - Election 2013  
from June 12, 2013 to June 12, 2013 at 15:00  
2 respondents - Final results

[Click here for a printable version](#) 

**Configuration**  
Parameters  
Content of the consultation

**Test**  
Test the consultation

**Data Analysis**  
[Results of the consultation](#) Results of the consultation  
[Participation ballots \(Excel\)](#)  
[Participation ballots \(Html\)](#)  
[Participation ballots \(Zip\)](#)  
[Participants list](#)

[Back to the list of consultations](#)

---

**MAUT - Election 2013**

This consultation was conducted via Omnivox from June 12, 2013 until June 12, 2013 at 15:00. 2 respondents participated.

**Display results**

[Click here to apply the new display parameters](#) 

**Received comments**  
For questions where the "Allow the participant to enter a comment" options was checked, you can display the text that was entered by participants. Note that text entries for questions with "free composition" are not displayed here.

Display received comments  
 Do not display received comments

**Scale values**  
 Display scale values for each question  
 Do not display scale values for each question

**Results**

**Question 1**  
*Please vote for your favorite candidate*

1. Melissa Nguyen  
2. Robert Young  
3. Thierry Singer

**Answers received**

	Total
1. Melissa Nguyen	1 (50,0%)
2. Robert Young	1 (50,0%)
3. Thierry Singer	0 (0,0%)
<b>Total</b>	<b>2 (100,0%)</b>

**Question 2**  
*Please vote for two Committee members*

1. Barbara Sinclair  
2. Tony Smith  
3. Lawrence Jones  
4. Isabella Sabri

**Answers received**

	Total
1. Barbara Sinclair	1 (50,0%)
2. Tony Smith	0 (0,0%)
3. Lawrence Jones	1 (50,0%)
4. Isabella Sabri	2 (100,0%)
<b>Total</b>	<b>2 (100,0%)</b>



**Participation ballots:** view the details of each participation ballot in the format of your choice:

- An Excel spreadsheet.
- An HTML file. The participation ballots open in a new window in your internet browser.
- A zip file. You need to save the file on your computer and extract the files. There is a file for each participation ballot. For example, if 200 people participated in the survey, you will get 200 files when you extract the zip file.

## Appendix

### HTML codes

- HTML codes, also referred to as HTML tags, are keywords surrounded by angle brackets e.g. `<body>`.
- Generally tags come in pairs like: `<b> text </b>`

`<b>` is the opening tag

`</b>` is the closing tag

- The closing tag is the same as the opening tag but with a forward slash before the tag name.
- There is always a tag before and after the text that you want to modify.

`<p>paragraph</p>`

- Different tags do different things, for example:

`<big> text </big>` for a larger font sized text.

`<strong> text </strong>` to write in bold.

- You can also combine tags. Put your text between the tags like this to obtain the desired result:

`<big><strong> I want this text to be larger and bold</strong></big>`

- Some tags do not need to be in pairs. Here are two examples:

Line break: `<br />` It inserts a new line.

Horizontal line: `<hr />` It inserts a horizontal line.



See examples of HTML tags and the result on the next page.

## HTML code

## Result

<h1>This is a heading 1</h1> **This is a heading 1**

<h2>This is a heading 2</h2> **This is a heading 2**

<h3>This is a heading 3</h3> **This is a heading 3**

<font size="4"><strong>bold </strong></font> **bold**

<font size="4" color="red"> RED</font> **RED**

<font size="6" color="green">Bigger green</font> **Bigger green**

<u>underlined</u> underlined

<font size="1" color="blue">small blue </font> **small blue**

<p align="center"> center text </p> **center text**

<big>BIG</big> **BIG**

<small>small</small> **small**

<a href="http://www.mcgill.ca"><u>This is a link</u></a> [This is a link](http://www.mcgill.ca) (Link to the McGill home page)



## Look for McGill Usernames

Anyone who has access to the HR datawarehouse can retrieve McGill usernames in Minerva as follows:

1. Sign in to [Minerva](#).
2. Click on the **Reports** Tab.
3. Click on **HR Data Warehouse Query**.
4. In **Orgn\***, select and organization or select all by clicking on \*\*\* **All the Orgn on this list** \*\*\*
5. In **Group Data\***, click on **Personal Information Columns**.
6. Scroll down towards the bottom and click **Submit**.
7. You can download this report to Excel. There is a download icon at both the top and the bottom of the report. When the small popup screen comes up, choose to **SAVE** the file to your computer as the **OPEN** command takes a long time to run.
8. **McGill Username** is at the far right of the file. You can delete all of the columns **except** for **McGill Username**.

## AD group name standards

The AD group names have the following structure: **aaa-bbbbbbbb\_ccccccccc\_yyyy-mm**

E.g. 095-Election\_Art\_History\_2013-05  
101-Election\_Economics\_2013-05

**aaa**      Organizational code of the unit (or on behalf of which) is conducting the election or survey  
e.g. 101 = Economics

**bbbbbbbb**      Type of consultation: **Election** or **Survey**

**cccccccc**      Description of the consultation.  
E.g. "Sociology" or "Sociology\_Chair".

**YYYY-mm**      The year and month around which the election or survey is expected to be conducted. It does not matter if the consultation crosses 2 calendar months or if the consultation is delayed.

